Rethink Content: An Open, Integrated View

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New Content on Open, Integrated Platforms

• Seamless Access to Your Content across Ecosystem
• Enabled by Cloud, 4G, and Fiber
• Agnostic to OS, Device, Network Platform
• Expand the Concept of “Content”
• Expand the Opportunity
Bringing it Together

Better TV Sells Fiber
Connected Devices Sell Mobility
Seamlessly Connect All in the Cloud
Why IPTV

Internet Protocol Television

Two-way interactivity
versus traditional, one-way cable/satellite broadcast network

Integration
TV, PC, home phone and wireless devices all work together

Customer experience
Unmatched features, control and personalization

AT&T is the only national (U.S.) service provider to offer a 100% IP-based TV service
U-verse Multi-Screen Innovation

Unique Apps & Content Across Devices

U-verse Mobile
Available on 4 major OSs, +10 handsets... and growing

U-verse Online
More than 100,000 TV shows, movies and clips

U-verse TV
+155 HD channels, Total Home DVR, and interactive apps that enhance, differentiate, engage
Rapid Growth of Connected Devices

U.S. Sales of WWAN Embedded Portable CE Devices (in millions)

- Digital Still Camera (DSC)
- Portable Navigational Device (PND)
- Mobile Internet Device (MID)
- Netbook
- Portable Games Console (PGC)
- Portable Media Player MP3/4 (PMP)
- E-Book Reader (EBR)
- Tablets
- Notebook

~1.7M
~60M

2008 2009 2010 2011 2012 2013 2014

Our vision is that by 2020, we will have **50 billion connected devices**  
- Ericsson CEO, Mar 2010

There will be **1 trillion devices connected** to the Internet by 2013  
- Cisco CTO, Mar 2010

**20 Billion connected devices** by 2020  
- telecomseurope.net, Feb 2010

Non-Handset Devices to Account for **$90 Billion in Operator Revenue** by 2013  
- Rethink Wireless, Sep 2008

The total available market for embedded CE devices is projected to grow at a **41% compound annual growth rate** (CAGR) in the US, through 2014.  
- Strategy Analytics, Sep 2010

*Source: Strategy Analytics, WAN Enabled CE Devices US Market Forecast, Sept. 2010*
A New Generation of Connected Devices

The AT&T Networks

Wireless + Broadband + International

Computing
PNDs
Digital Cameras/Camcorders
In-Car, Telematics
Healthcare
Picture Frames
Tablets
Tracking Devices
Gaming Devices
Smart Meters
Healthcare

AT&T’s vision: To encourage **health** and **wellness** through **wireless connectivity**

- Support the ecosystem to provide constant and timely access to data anytime, anywhere
- Improve healthcare productivity and efficacy
- Find opportunities to reduce costs in our healthcare systems
- Enable opportunities to promote wellness and healthy lifestyles

**Disease Management**

**Wellness & Healthy Lifestyle**
**Automotive**

AT&T’s vision: Engage all auto makers to integrate wireless into the vehicle for safety, diagnostics and entertainment

- Establish a market share lead in embedded vehicle connectivity
- Bring connectivity through AT&T’s broad portfolio of wireless networks and technology, including WAN, Wi-Fi, and Bluetooth
- Engage chip makers to provide low cost, automotive grade 3G modules
Envisioning a “Sensorized” Home

M2M throughout the home to help with...

- Doorbell
- Intrusion/Break-In
  - Door ajar/unlock detector
  - Window breakage detector
  - Motion detector
- Refrigerator/Freezer trouble
- Oven/Stove/Coffee Pot Monitor
- Water Detection
  - Basement flooding
  - Broken hot water heater
  - Washing machine/dishwasher leak
  - Unauthorized swimming pool access
- Carbon Monoxide/Smoke/Radon Detector
- Temperature
  - Remote home temperature reading
  - Detector triggers above/under a certain temperature (freeze alarm)
- Medical monitoring/emergency detection
- Electrical service failure
- Remote Controls (e.g. light, entertainment center)
- **Medical Monitoring/Emergency Detection**
- **Energy Conservation /Usage Management**
  - Smart appliance programming
  - Utility meter reading
  - Electric vehicle recharging

*Not just sensors, but a smart, easy-to-set-up, fully-integrated, Peace of Mind environment*
Thank You!